UNIVERSITY OF
STIRLING

AGRESSO Business World
User Guide - Web Requisitioning

Overview…….3

Logging on to Agresso Business World……...……...4

Creating a Requisition…….5

Creating /Amending a Parked Requisition……..9

Checking the Status of a Requisition…….10

Authorisation of Requisitions ……...11

Distribution of Purchase Orders……..14

Production of Copy Purchase Orders……....15

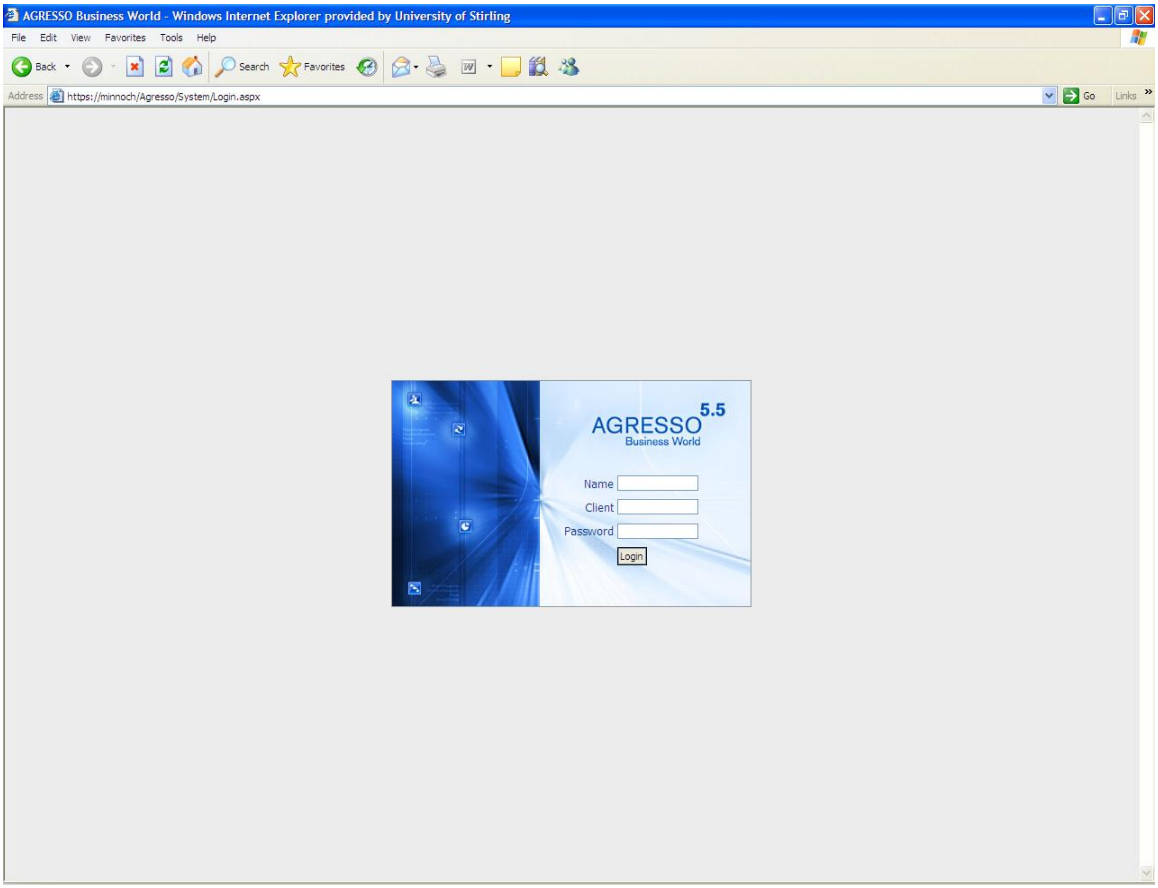
Goods Receipting……...18

Web Reporting……..21

Overview

This document is designed to lead you through the web requisitioning process including authorisation of requisitions, receipting of deliveries and reporting.

Logging on to Agresso Business World



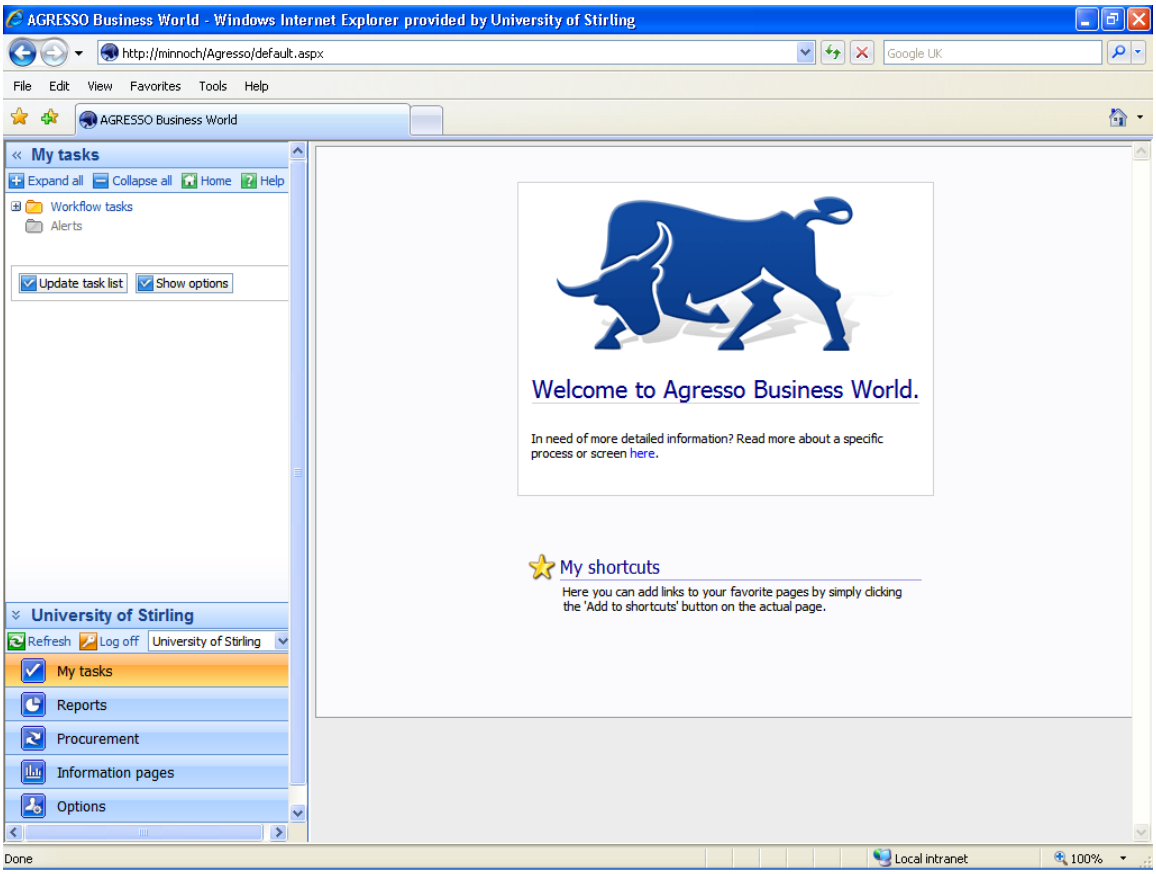
URL https://abwweb.stir.ac.uk/Agresso/System/Login.aspx

Login Name <userid>
Company <P1>
Password <Agresso password>

If you are logging on to Agresso for the first time, and have been issued with a password by Systems, you will need to change this password to something more appropriate. Do this by selecting ‘Options’ then select ‘Change Password’. You will be asked to enter your old (current) password followed by your new password, twice. Then Click on “Save” Your password must be at least 6 characters and contain both letters and numbers.

Creating a Requisition

Log on to Agresso Business World

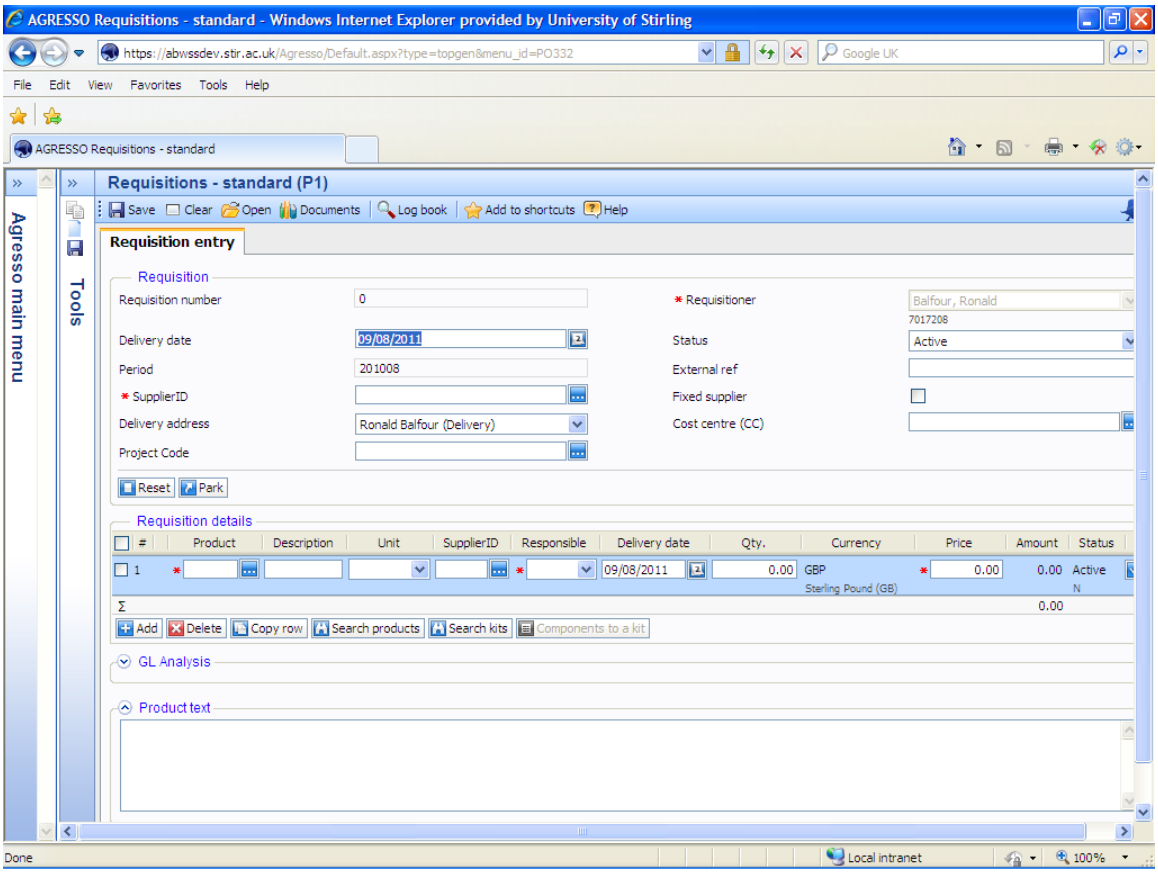

AGRESSO Business World - Windows Internet Explorer provided by University of Stirling
http://minnoch/Agresso/default.aspx
File Edit View Favorites Tools Help
AGRESSO Business World
My tasks
Expand all Collapse all Home Help
Workflow tasks
Alerts
Update task list
Show options
University of Stirling
Refresh Log off University of Stirling
My tasks
Reports
Procurement
Information pages
Options
Welcome to Agresso Business World.
In need of more detailed information? Read more about a specific process or screen here.
My shortcuts
Here you can add links to your favorite pages by simply clicking the 'Add to shortcuts' button on the actual page.
Done
Local intranet
100%

Select Procurement

then ‘Requisitioning’ folder

then ‘Requisitions - standard’

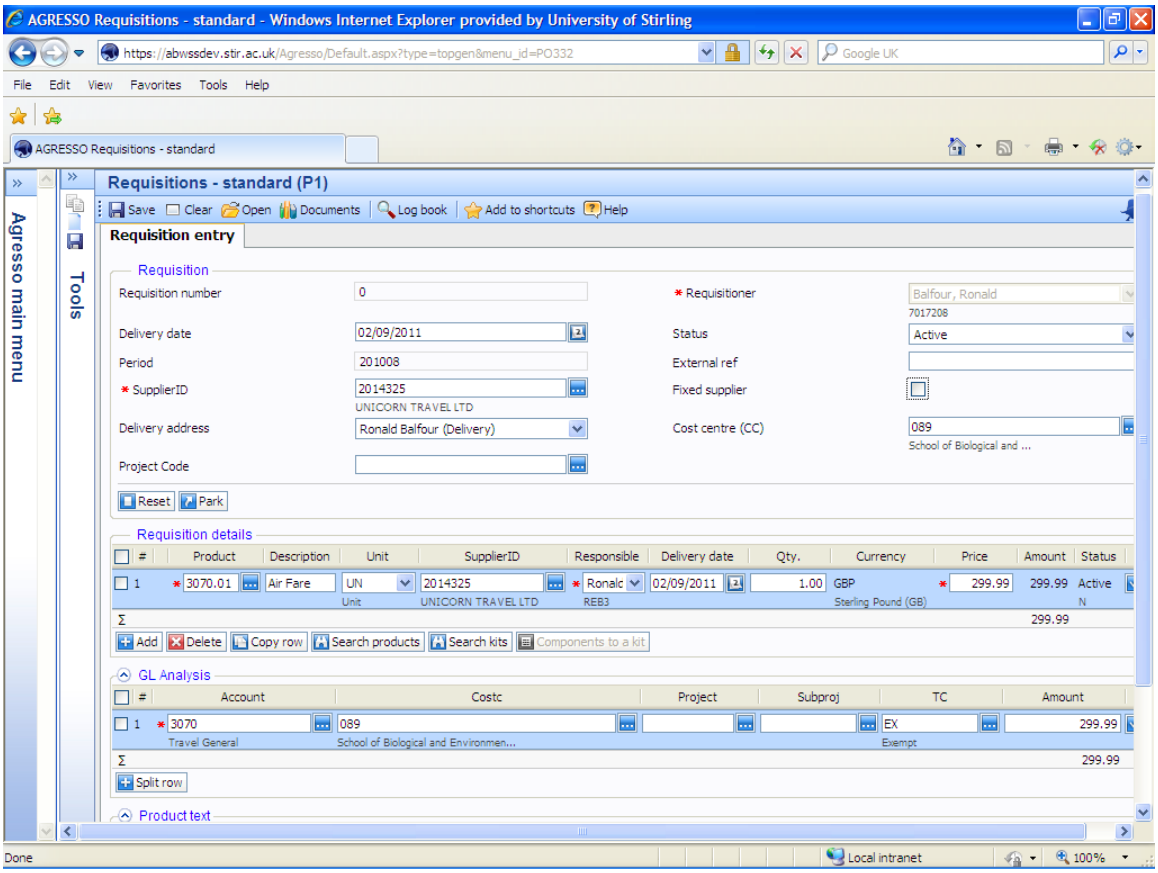
This page lets you register new purchase requisitions



Note: The Requisition Entry screen can be maximized by clicking « Procurement at top left of screen.

1. To create a requisition, first complete the requisition header fields (under 'Requisition'): Delivery Date, Status (default 'active' should **not** be changed), External ref, Supplier ID, Fixed Supplier, Delivery address, Cost Centre and Project Code. To search for an item in a field, click on 'field help dialogue' icon. 'Requisitioner' and 'Period' fields contain default information. Select the appropriate Deliver address from the drop-down list.

Note:
'Fixed supplier' should be selected if requisition being created is for only one supplier, chosen Supplier ID will then default to each subsequent requisition line.


AGRESSO Requisitions - standard - Windows Internet Explorer provided by University of Stirling
Requisitions - standard (P1)
Requisition entry
Requisition details
GL Analysis
Product text

2. To add a product to the requisition, go to 'Requisition details'. Click on line 1 and the cursor will appear in the Product field. To select a product, click 'field help dialogue', enter basic criteria and click on search. The product code will always be in the form of the appropriate account code with the suffix '.01' e.g. 3070.01 for travel. Alternatively, directly input product code if known.

3. Having entered the product code in the Product field, tab to the Description field and amend the default description to reflect the goods or service what you want to purchase. Full details can be entered in the 'Product text' field; this field should be used to add any detail necessary to supplement the description used the Product description above.

4. Tabbing out of the Product field retrieves the default information for 'Unit'. A Default unit will appear. Accept by tabbing to next field or use drop-down list to select alternative.

5. To select a supplier, tab to supplier field. The supplier selected in the requisition header will default. To select a different supplier, click 'field help dialogue', enter basic criteria and click on search. Click on the Supplier required. This will populate the Supplier field. Alternatively, directly input Supplier ID if known.

6. At Responsible field, your name **must** be selected from the drop down menu.

7. Delivery date will default to the value in the header field. Amend as necessary.

8. In the Qty (Quantity) field enter the quantity being ordered and tab to next field.

9. In the Price field enter the cost price (excluding VAT) and tab to the next field.

10. At 'GL Analysis', Account, Cost Centre and Project codes will default from the information input at the Requisition header. If an alternative Cost Centre or Project is required, click field help dialogue or input GL information if known. Subproj (sub-project code) should be selected in the same way.

Note: the Resource Number field will appear against certain Accounts. The Requisitioner's Resource Number will default; this **must** either be deleted or overtyped as appropriate.

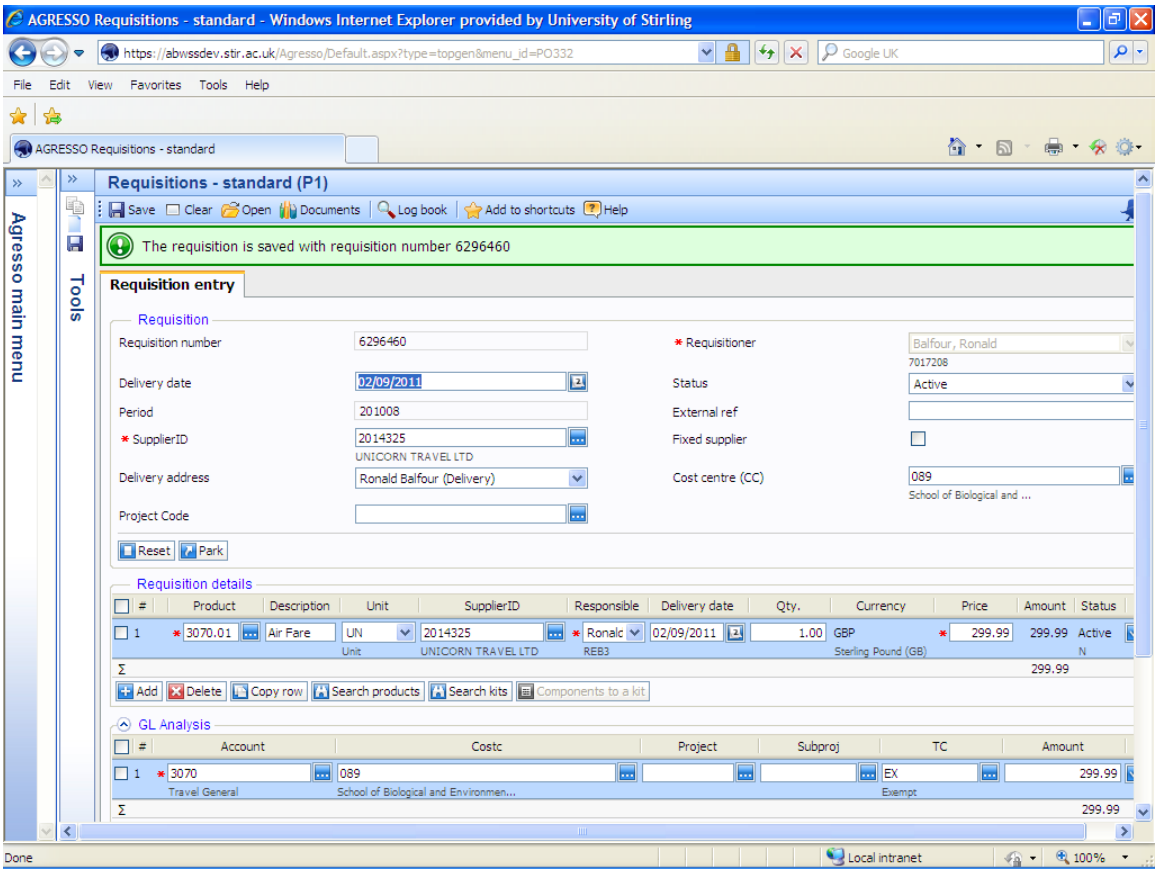
11. To add additional product lines click 'Add' and repeat processes 2-10 above.

12. To delete a line, tick the box on the extreme left of line, and click 'delete'

13. To view detail on previous lines click on the particular line.

14. Save your requisition entries with (default) 'Active' status by clicking save icon. Requisition will then be sent for approval.

15. Once a requisition has been saved it will be allocated a requisition number. If you are saving the document as a Parked Requisition (see below), you should note the requisition number that has been allocated.



Creating a Parked Requisition

1. Open Requisition Entry screen. At ‘Status’ field on Requisition Entry screen, change from status or requisition from ‘Active’ to ‘Parked’ by selecting ‘Parked’ from drop-down menu.

2. Complete and save requisition.

Amending a Parked Requisition

1. To recall a Parked requisition (or a requisition that has not yet been authorised), open the Requisition Entry screen, click

and enter the requisition number for the requisition you wish to update.

2. Tab through to the next field. The requisition will automatically be displayed.

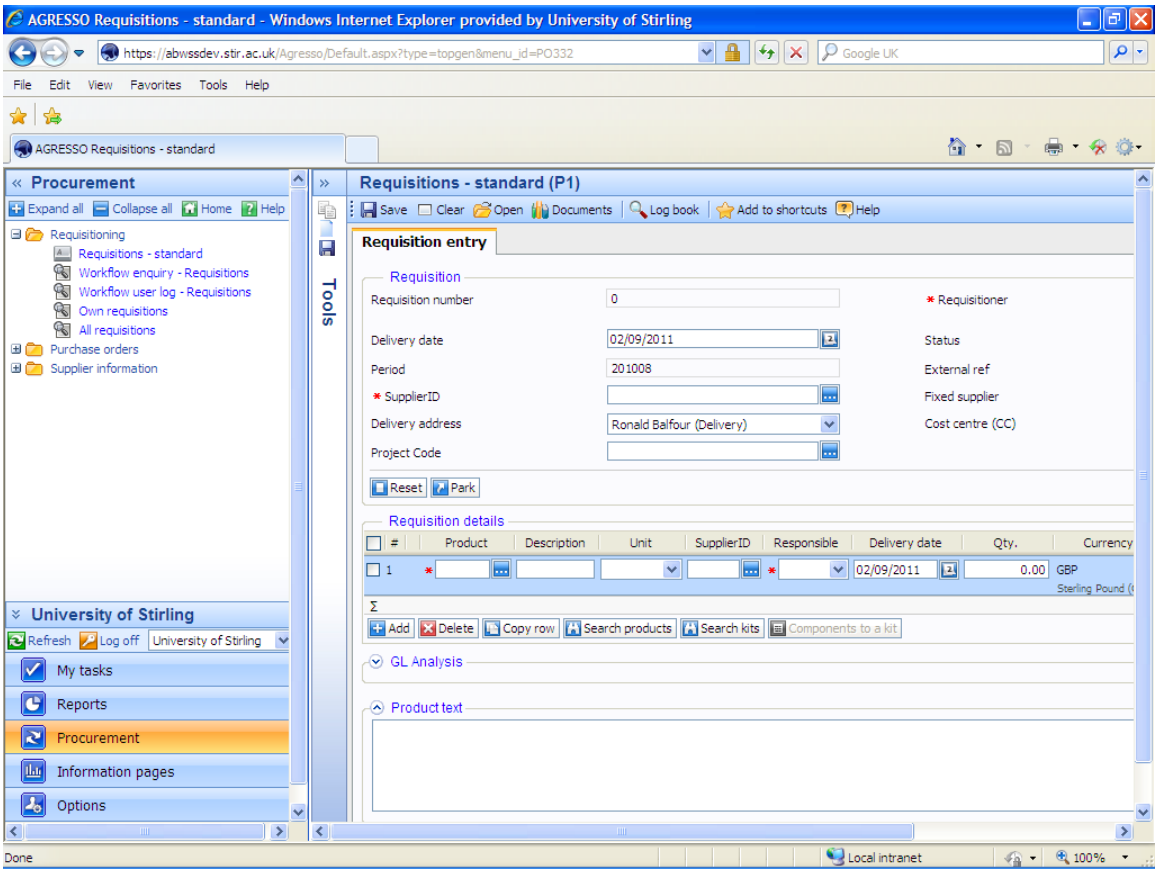
3. You may now update the registered requisition. All lines and fields may be changed, lines may be removed and additional lines added as required. To apply

changes to the first original line, click twice.To remove a line from the requisition, select the 'Delete' command. To add a requisition line, select 'new'. If no further changes are to be made to your requisition change status to 'Active' and save. Requisition will then be sent for approval.

Checking the status of a Requisition

The status of a requisition can be checked at any stage of the requisitioning process.

Select Procurement
Then 'Requisitioning' folder



Select **'Workflow Enquiry - requisitions'**
This report allows requisitions to be searched by 'status'. 'Status' lets you search against any of the various stages a requisition passes through e.g. workflow in progress, finished etc.

Under 'Parameters' Select status from drop-down menu

In 'Task owner like' field add your own user id

Under ‘Results’ click search

Data can be sorted by populating particular field below each header (e.g. task owner, product etc), then clicking search.

Alternatively

Select **‘Workflow User Log - requisitions’**
Under ‘Results’ click search

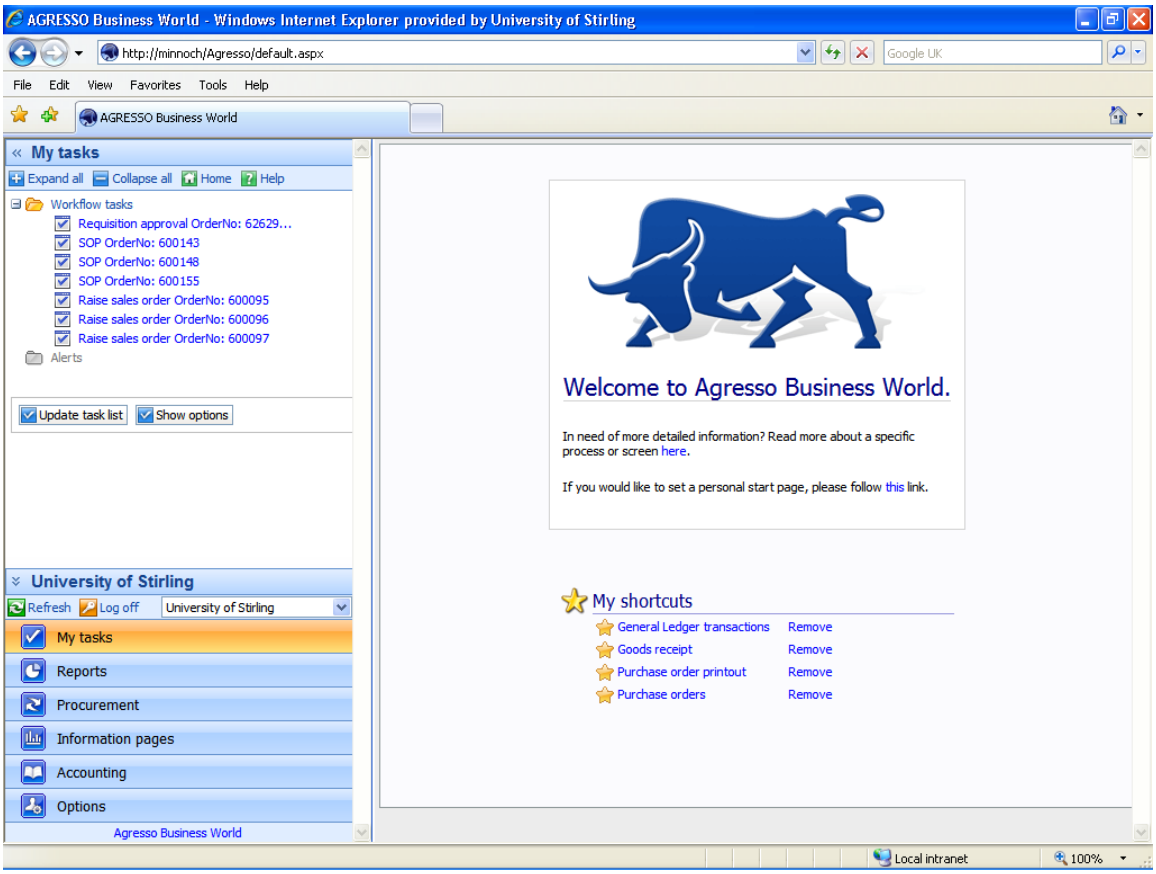
Data can be sorted by populating particular field below each header (e.g. task owner, product etc), then clicking search.

Authorisation of Requisitions

Authorisers who are logged onto Agresso Business World will receive a ‘task alert’ notification of requisitions awaiting authorisation.

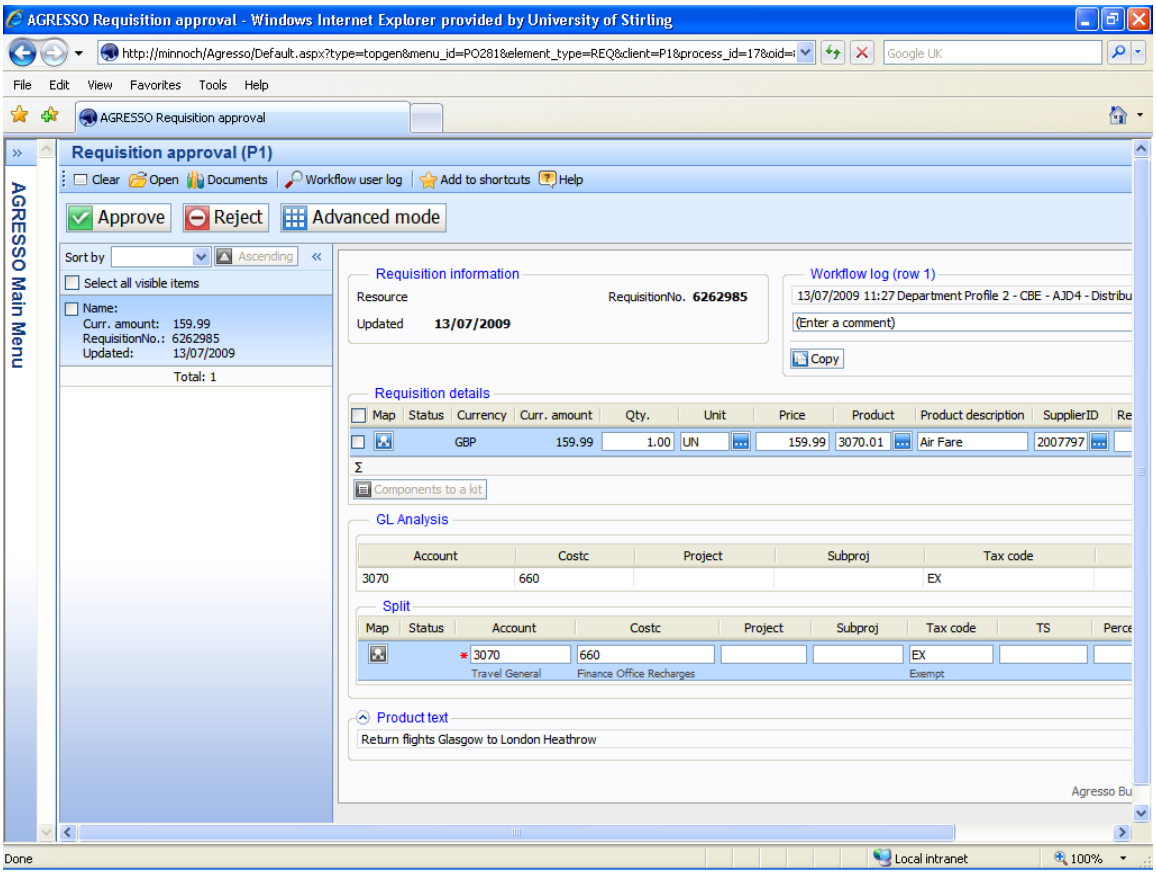
Select My Tasks

then ‘Workflow Tasks’ folder



1. Under the Workflow Tasks folder there will be listed requisitions that are awaiting approval. Clicking on any requisition approval order number will take you to the Requisition approval screen.

2. To review a requisition, click on the line detail to drill down. Any field not greyed out can be amended with the changes being saved when the document is authorised.


AGRESSO Requisition approval - Windows Internet Explorer provided by University of Stirling
File Edit View Favorites Tools Help
AGRESSO Requisition approval
Requisition approval (P1)
Clear Open Documents Workflow user log Add to shortcuts Help
Approve Reject Advanced mode
AGRESSO Main Menu
Sort by Ascending
Select all visible items
Name:
Curr. amount: 159.99
RequisitionNo.: 6262985
Updated: 13/07/2009
Total: 1
Requisition information
Resource
RequisitionNo. 6262985
Updated 13/07/2009
Workflow log (row 1)
13/07/2009 11:27 Department Profile 2 - CBE - AJD4 - Distribu
(Enter a comment)
Copy
Requisition details
Map Status Currency Curr. amount Qty. Unit Price Product Product description SupplierID
GBP 159.99 1.00 UN 159.99 3070.01 Air Fare 2007797
Components to a kit
GL Analysis
Account Costc Project Subproj Tax code
3070 660 EX
Split
Map Status Account Costc Project Subproj Tax code TS
3070 660 EX
Travel General Finance Office Recharges Exempt
Product text
Return flights Glasgow to London Heathrow
Done
Local intranet
100%

3. Requisitions can be approved in one of three ways. Choice of approval method will depend upon the quantity and complexity of the requisition lines:

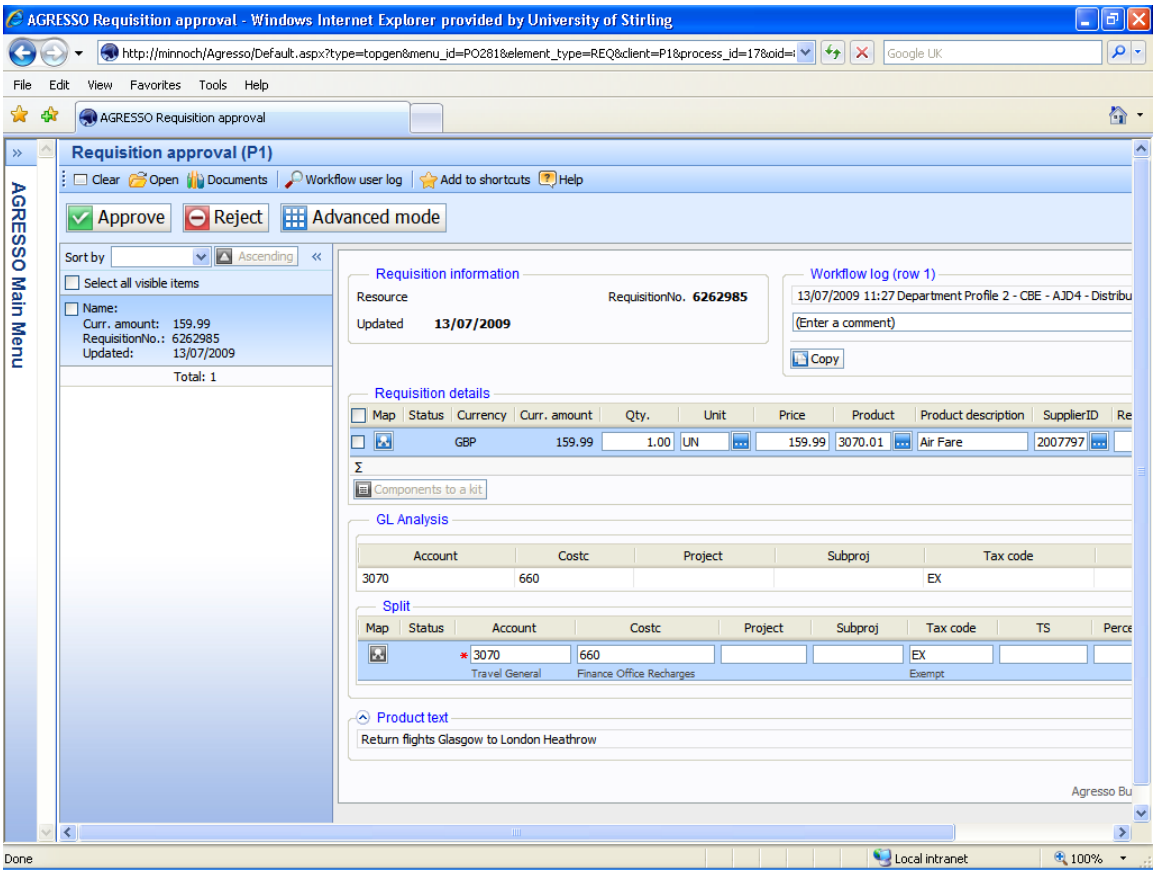
Method 1 - Process one item at a time in 'simple mode'

Click 'Simple Mode'

To process one selected item only, click the 'Approve' or 'Reject' button at the top. Before you process the item, you may do some or all of the following:

Review the details in the Requisition details section and make necessary changes.

View workflow log information for each row by clicking on the relevant row.



Method 2 - Process Requisitions in 'advanced mode'

Click **'**Advanced mode'

Note: the header buttons are now unavailable, except 'Simple mode', which can be used to switch back to simple mode.

Review the details in the section Requisition details and make appropriate changes, row by row.

Select the check box of one or more of the relevant item rows, and then click 'Approve' or 'Reject' button under the rows.
Note: to remove one or more actions you have set, select the check box of those items and click 'Undo', or click the correct action.

View workflow log information for each row by clicking on the relevant row.

Execute the selected actions by clicking ‘Save’ at the bottom of the page.

Note: Requisitions can be authorised off campus. Approvers must however ensure that Agresso is accessed via the **‘Finance - Agresso web’** link on the University Portal.

Distribution of Purchase Orders

Once approved, requisitions will be processed as Purchase Orders. This is an automated process which runs hourly, Mon- Fri.

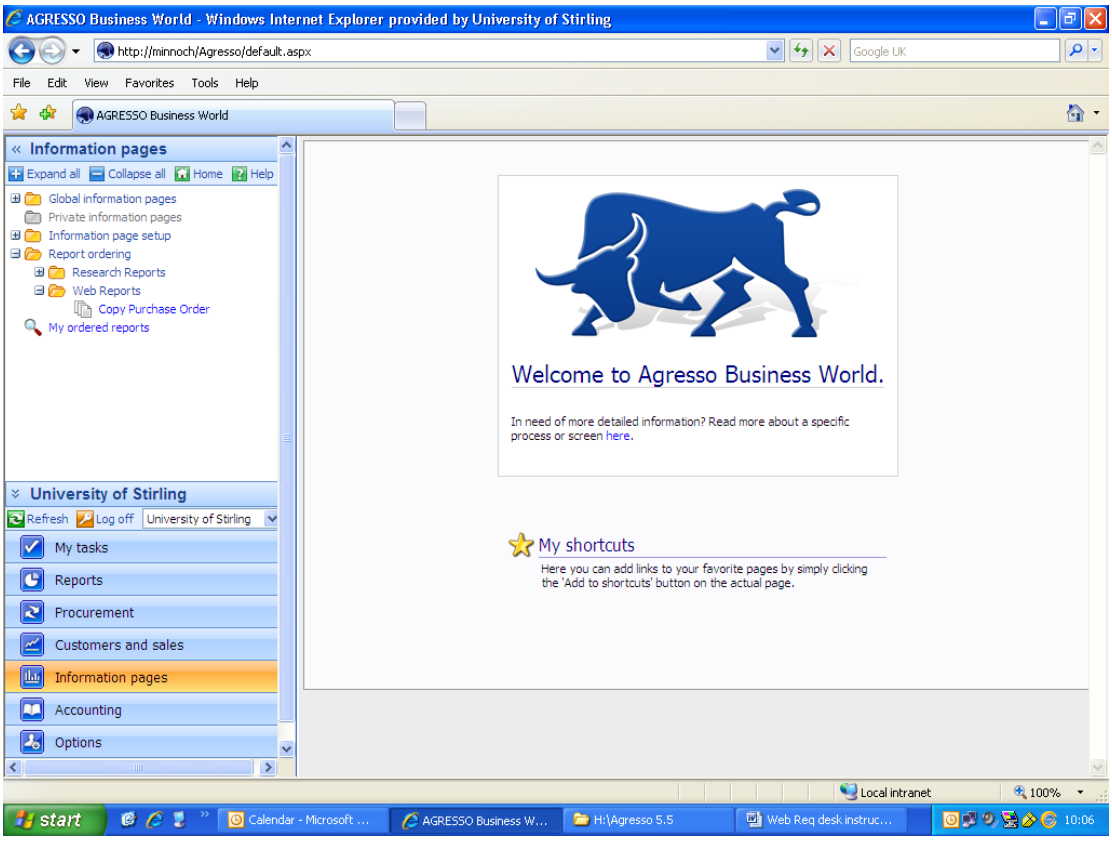
E-enabled Suppliers
If a Purchase Order has been raised against a supplier that is e-enabled, the Purchase Order document will automatically be sent to the supplier as a PDF email attachment.

All other Suppliers
If a Purchase Order has been raised against a supplier that is **not** e-enabled, the Requisitioner will be sent an email which contains the Purchase Order as a PDF attachment. The Purchase Order must then be sent to the supplier either by email, fax or mail.

Note: If an authorised requisition does not convert to a Purchase Order, queries should be directed to the Procurement Office on procurement@stir.ac.uk.

Production of Copy Purchase Orders

Select ‘Information pages’

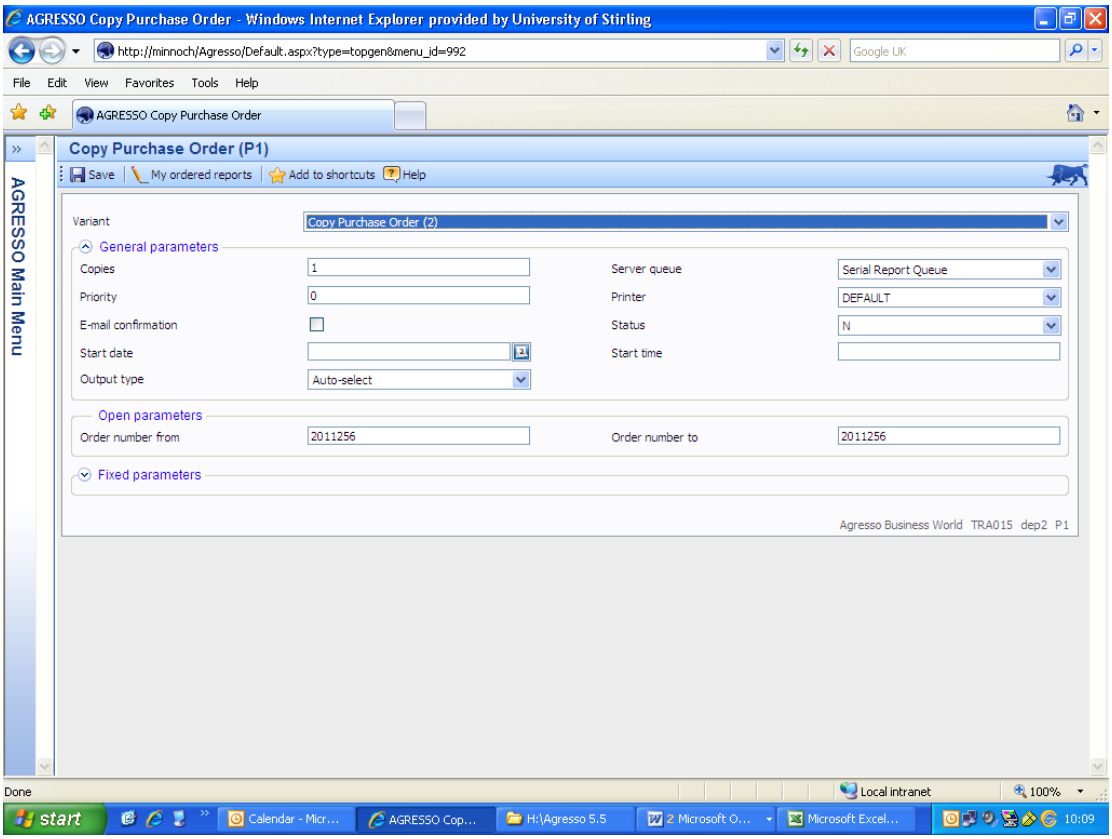


then ‘Report Ordering’

then ‘Web Reports’

then ‘Copy Purchase Order’, select (drop down) variant

Assign PO number to both ‘Order number from’ and ‘Order number to’ fields, tab out and click on ‘Save’. **Note: the same PO number must be assigned to both fields.**



Next go to ‘My order reports’

Select Report by clicking on line. A copy of the Purchase Order, in the form of a pdf file, will then be produced.

Identifying the Purchase Order number of an Authorised Requisition

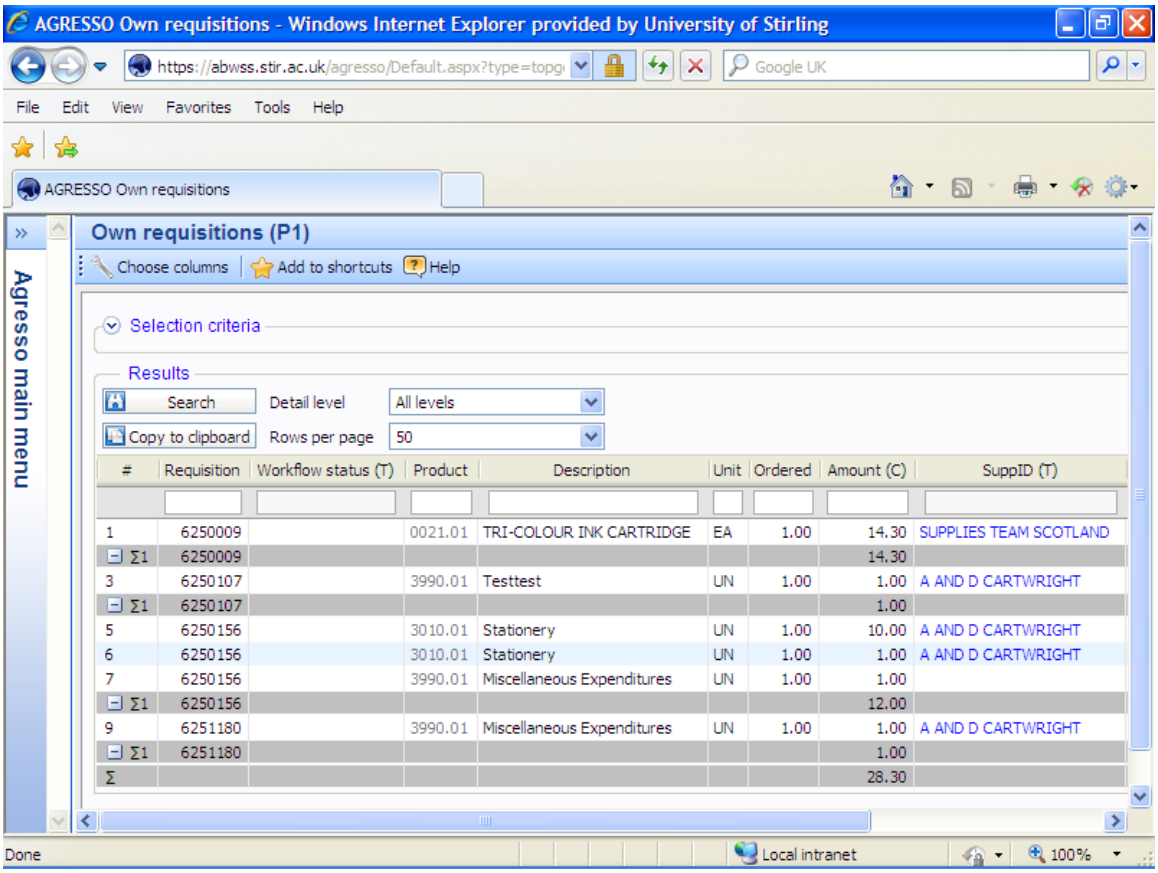
Select Procurement

Then ‘Requisitioning’ folder

Select Own Requisitions

Click ‘Search’

Populate empty Requisition field and click ‘Search’ again

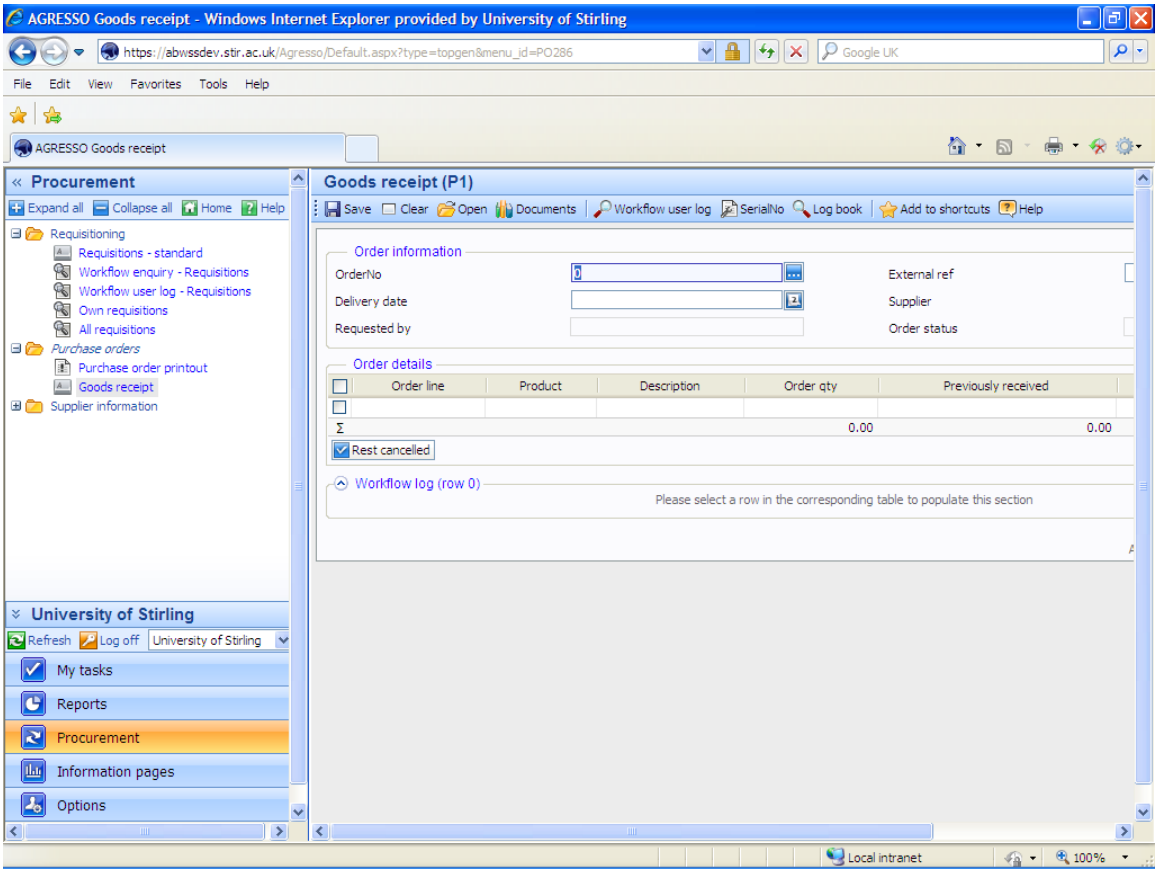

AGRESSO Own requisitions - Windows Internet Explorer provided by University of Stirling
https://abwss.stir.ac.uk/agresso/Default.aspx?type=topg
Google UK
File Edit View Favorites Tools Help
AGRESSO Own requisitions
Agresso main menu
Own requisitions (P1)
Choose columns
Add to shortcuts
Help
Selection criteria
Results
Search
Detail level
All levels
Copy to clipboard
Rows per page
50
Requisition Workflow status (T) Product Description Unit Ordered Amount (C) SuppID (T)
1 6250009 0021.01 TRI-COLOUR INK CARTRIDGE EA 1.00 14.30 SUPPLIES TEAM SCOTLAND
Σ1 6250009 14.30
3 6250107 3990.01 Testtest UN 1.00 1.00 A AND D CARTWRIGHT
Σ1 6250107 1.00
5 6250156 3010.01 Stationery UN 1.00 10.00 A AND D CARTWRIGHT
6 6250156 3010.01 Stationery UN 1.00 1.00 A AND D CARTWRIGHT
7 6250156 3990.01 Miscellaneous Expenditures UN 1.00 1.00
Σ1 6250156 12.00
9 6251180 3990.01 Miscellaneous Expenditures UN 1.00 1.00 A AND D CARTWRIGHT
Σ1 6251180 1.00
Σ 28.30
Done
Local intranet
100%

Goods Receipting

Select ‘Procurement’

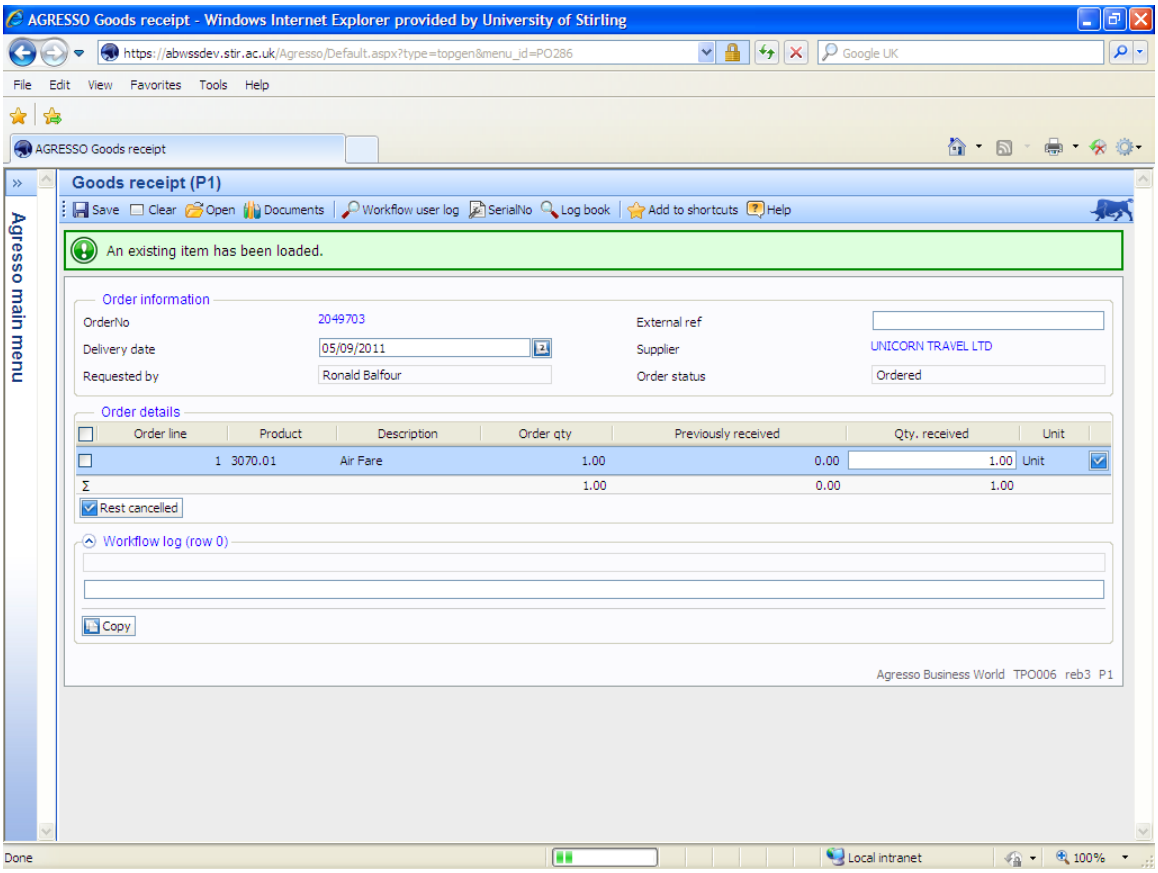
Under ‘Purchase orders’ folder

Select ‘Goods receipt’



Enter ‘Goods received entry’ screen

Enter a Purchase Order number and tab through to next field (Message ‘An existing item has been load’ will appear).


AGRESSO Goods receipt - Windows Internet Explorer provided by University of Stirling
https://abwssdev.stir.ac.uk/Agresso/Default.aspx?type=topgen&menu_id=PO286
File Edit View Favorites Tools Help
AGRESSO Goods receipt
Goods receipt (P1)
Save Clear Open Documents Workflow user log SerialNo Log book Add to shortcuts Help
Agresso main menu
An existing item has been loaded.
Order information
OrderNo 2049703
Delivery date 05/09/2011
Requested by Ronald Balfour
External ref
Supplier UNICORN TRAVEL LTD
Order status Ordered
Order details
Order line Product Description Order qty Previously received Qty. received Unit
1 3070.01 Air Fare 1.00 0.00 1.00 Unit
Σ 1.00 0.00 1.00
Rest cancelled
Workflow log (row 0)
Copy
Agresso Business World TPO006 reb3 P1
Done
Local intranet
100%

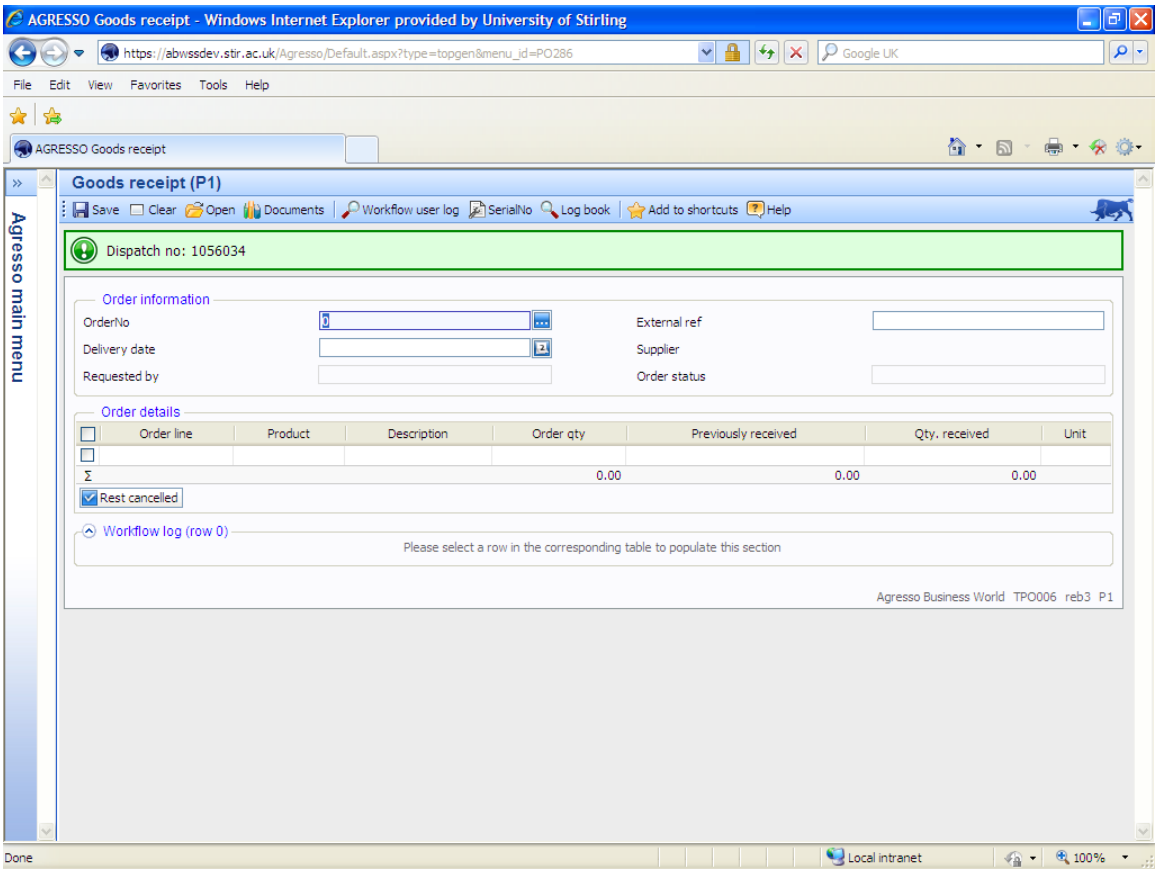
Under ‘Purchase order’ enter Delivery Note number in ‘External ref’ box if appropriate.

Enter Delivery date.

Under ‘Purchase order details’ click on line(s) required. Verify that the delivery details and order quantity agree, otherwise change the amount in the ‘Units to receive’ field to reflect the actual amount delivered.

Click on ‘Save’

All records will be updated and a Dispatch number will be generated and displayed. The Dispatch number should be written on the delivery note.


AGRESSO Goods receipt - Windows Internet Explorer provided by University of Stirling
https://abwssdev.stir.ac.uk/Agresso/Default.aspx?type=topgen&menu_id=PO286
File Edit View Favorites Tools Help
AGRESSO Goods receipt
Goods receipt (P1)
Save Clear Open Documents Workflow user log SerialNo Log book Add to shortcuts Help
Agresso main menu
Dispatch no: 1056034
Order information
OrderNo
Delivery date
Requested by
External ref
Supplier
Order status
Order details
Order line Product Description Order qty Previously received Qty. received Unit
Σ 0.00 0.00 0.00
Rest cancelled
Workflow log (row 0)
Please select a row in the corresponding table to populate this section
Agresso Business World TPO006 reb3 P1
Done
Local intranet
100%

Unbooking Purchase orders

If goods/services are receipted in error (e.g. 10 is entered instead of 1) a minus quantity (e.g. - 9) should be entered into the particular goods received entry order line.

Requests for Manual Termination of Purchase Orders

Note: Prior to a Purchase Order termination request being emailed to Procurement, any open PO lines on the Purchase Order that:

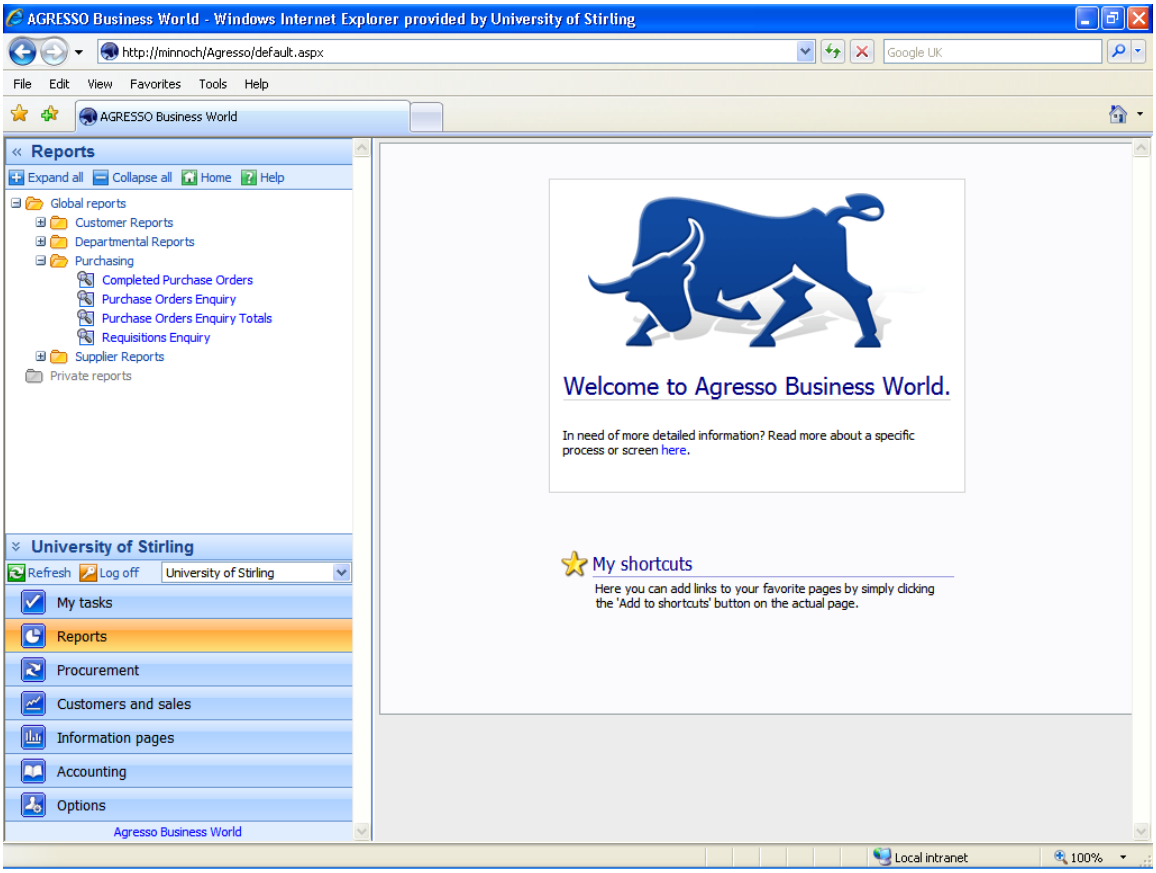
1. represent an (invalid) outstanding commitment i.e. the 'to invoice' value is not zero
and
2. have already been booked in

must first be unbooked by the Requisitioner. Upon receipt of the emailed request, Procurement will terminate the Purchase Order.

Web Reporting

Select ‘Reports’

Select Reports/Purchasing Reports



Click individual Report, new report window will open

Set parameters as required (under ‘Parameters’)

Click ‘Search’ under ‘Reports’

Report showing data for your cost centre(s) only will be created.

Note: ‘Copy to Clipboard’ facility can be used to copy report data into Excel worksheet.